



Population Tracking Users Group

Date: Thurs., July 15, 2004
Time: 9:00–11:00 a.m.
Location: Rockledge 2, Room 9100
Chair: Carlos Caban

Next Meeting: August 18, Thurs., 9–11 a.m., Rockledge 2, Room 9100

Action Items

1. (All) If you have grants with foreign protocols, send one or two grant numbers to Carlos to see how the two approaches differ.

Release Notes

New Pop Tracking release notes will be published in late July–early August when the release occurs. Carlos reviewed the draft of these release notes with the group and will send their input to the eRA Documentation Team for incorporation into the final copy. Carlos pointed out that he thought the release notes would be a good place to list and define each access role. The following are suggestions and input to the Release Notes. This does not include grammatical corrections and sentence edits.

- Add a note saying “An individual may have more than one role, e.g., a Program Officer may have both the Update and Approval roles” in the first paragraph.
- Module should be modified to allow anyone with the Read-Only role to see data from all ICs, not just their own. In the past, access was limited to a user’s own IC because there was no “read-only” role and users could make changes in anything they could access, which was unacceptable. With the new “read-only” role, access should be to all IC data because there are many instances, such as a shared grant, when it is important to see Pop Tracking data from other ICs.
- Read Only role: Add note that when you want to see the population tables, click on the Snapshot button. Check whether the Read Only role can see the table data through the Grant Update Module (GUM) (available in all IMPAC II business modules) without changing the data..
- Add note in the Update Role section that you can refresh protocols and grants.
- Change the last sentence in the first paragraph of the Update Role section to read: They will **NOT** be able to approve the inclusion data unless they have the Approval Role.
- Override Role: The group agreed that in many ICs, the “lead” Pop Tracking person is not always involved in population tracking. It was suggested that, with this in mind, each IC be given one Approval role only, which would be assigned to the “lead.” When the “lead” gets a better understanding of Pop Tracking and the Override Role, that person could train and increase the number of people in their IC assigned the Override Role.

- Delete the section, *Population Tracking Data Admin Role*. This is used by the Helpdesk and the group agreed that it is not really a Role but a function and, therefore, should not be included in the Release Notes.
- It was agreed that the “Principal Investigator Role” is not really a technical “role” in the module. However, since it is a “role” that people play in using the module, the term would be left in the release notes.

Grant Snapshot Report (Draft Revision)

The draft Pop Tracking Grant Snapshot Report that incorporated suggestions from the June meeting was reviewed and the following suggested revisions were made.

Project Information Page

- In the PI Information section, move “Institution” below “E-mail”.
- Move PI Information section above the Admin Codes section
- Add description of columns “Trgt,” “TA,” “Enrl.” and “EA” below the “Protocols Assigned” section.

Protocol Information Page

- Change title “Protocol ID:” to “System ID:” in the first section.
- Add fields for “Target Comment” and “Enrollment Comment” in the Target/Enrollment Section.
- Use the PI Comment field to add PI’s name for the protocol. However, research must be done to see if the field can be accessed and this information added by NIH staff if the PI already has input a comment.
- Add the PI name.
- It was noted that the grayed-out areas in the tables indicate inactive cells and no data can be entered.
- Regarding the “Foreign Countries” field, it was noted that the current policy is that this can be either an aggregated protocol for all foreign countries or a separate protocol for each foreign country.

Action: (All) If you have grants with foreign protocols, send one or two grant numbers to Carlos to see how the two approaches differ.

Phase III Protocols Page

Only one Phase III checklist is now displayed even if there are several Phase III protocols available. However, in the future, there should be one checklist for each Phase III protocol, and no checklist should be visible if it is not a Phase III protocol. There needs to be some indication on this page as to which protocol this checklist refers to.

Subprojects

There was much discussion regarding subprojects because there are at least two ways to link protocols to subprojects. There is a recent emphasis on each IC putting subproject data into the

IMPAC database, and each subproject is assigned an APPL ID. When a protocol is created, it may be attached to either the grant or the subproject at the current time, and most ICs attach it to the grant; in the later case, only by accessing the grant does protocol and the Grant Folder appear from which a Pop Tracking Grant Snapshot can be accessed. However, currently, you cannot click on the subproject and pull up the Grant Folder to get a Snapshot unless the protocol has been created attached to the subproject. The system is not set up to report on Subprojects separately. This needs further evaluation.

eSNAP

Dan Hall and Kim Witherspoon prepared eSNAP instructions last year, that Carlos updated several months ago, but they were never published; the instructions now need updating. He will update them and ask for input.

Carlos distributed a draft report entitled “Upcoming eSNAP Progress Reports” for discussion. The purpose of the report is to display the status of the grant data, whether entered and approved, so that IC staff may ensure that protocol target data is entered and approved before the PI needs to submit the eSNAP progress report and enrollment table for tracked grants. The listing is for institutions that are registered for eSNAP and whether the PI is also ENROLLED and able to enter the data via eSNAP. The following suggestions were made.

- Add the latest date by which the protocol must be entered and approved by the IC. This date is two months before the FY2004 Progress Report Due Date shown on the draft report. The PI is notified by email two months before the progress report is due.
- Add Receipt Date column.
- Put N as default in the target and enrollment columns rather than leaving it blank. Put N if the enrollment data is zero.

POP Tracking Reports and QVR Beta Release

Instructions for Downloading to Excel

Carlos had sent the group an email with instructions for downloading Pop Tracking queries from the “User Reports” item on the Population Tracking Page http://impacii.nih.gov/applications/apps_pop.cfm into a Microsoft Excel file. The email also included several places to find standard reports for Pop Tracking, what reports are generated by OER, and information and instructions for accessing and trying out the Beta release of Pop Tracking features available in QVR (there will be a demo of QVR at the August 19 meeting.). ePTUG members are encouraged to try out the QVR features(see the July 14, 2004 email for details).

Suggestions and comments are as follows:

- For the standard files in IMPAC II, each must be run separately. It was suggested that there be a combined standard report available.
- Much of the information in the IMPAC II standard reports can be run instead through the Pop Tracking module.

- It now is necessary to log in each time you access the reports. It was suggested that there be a way to log in once.

Web QT Update

Web QT was demonstrated at the June meeting and has been opened for general use at http://apps.era.nih.gov/webqt/displayWebQT.do?menu_itemPath=Basic+Search. Carlos encouraged the group to try it out and think about reports needed.

Attendance

Anyfryeva, Viktoriya (OER/ORA)	Doherty, Margaret (NIAMS) Gulya, Julia (NIDCD)	Richey, Rita (NLM/EP) Schafer, Susan (NIAID)
Barnes, Martha (NIEHS)	Krueger, Lisa (NCI)	Seppala, Sandy (LTS/PCOB)
Burge, Lori (NIGMS)	Le, Todd (NIDDK)	Witherspoon, Kim (NCI/ CTEP)
Caban, Carlos (OER)	Lee, Delores (NCRR)	Woodford, Joyce (NIAID)
Corbett, Dawn (NIMH)	Lingham, Angela (NIA)	Yee, Frances (NINDS)
Davis, Trenita (NIDCR)	Palagi, Sharry (NHLBI)	
Delcore, Sandi (NICHD)	Prince, Mary Lou (DEAS)	